

DOD: 1-12-89	MARY ELLEN RODRIGUEZ and DOLORES TRUJILLO , Daughters, were appointed as Co-Administrators without IAEA and with bond of \$8,000.00 on 1-16-1990.	NEEDS/PROBLEMS/COMMENTS: Note: On 2-23-15, the Court confirmed the sale of real property and set status hearing for receipt of the proceeds into a blocked account (Page B). Minute Order 5-20-15: Counsel represents that she received a letter from the lender on 5-18-15 stating that escrow will close on 6-15-15.
Cont. from 081414, 100214, 110614, 121814, 020215, 022315, 032515, 040115, 042915, 052015	Bond was filed and Letters issued on 1-17-1990.	
	Nothing further was filed.	
Aff.Sub.Wit.	The open estate was discovered and the Court set this status hearing.	
Verified		
Inventory		
PTC		
Not.Cred.	The I & A was filed 10-1-14, showing the estate value at \$30,000.00.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6-18-15
		Updates:
		Recommendation:
		File 1A – Rodriguez

DOD: 1-12-89		<p>DOLORES TRUJILLO, Daughter, is the sole remaining Administrators without IAEA and with bond of \$8,000.00.</p> <p>On 2-23-15, the Court confirmed the sale of real property and ordered the net proceeds of \$12,000.00 to be deposited into a blocked account.</p> <p>The Court set this status hearing for the filing of the receipt for blocked account.</p> <p>Status Report filed 3-24-15 states the petitioner has attempted to open the blocked account. The first time, she was incorrectly informed by a teller that she could not open one under these circumstances. After the attorney personally contacted the branch manager, he determined there was a miscommunication and assured the attorney that he would personally assist the petitioner when she returned. When she returned, she was informed that they would not open the account without a certified copy of the death certificate. Petitioner then proceeding to obtain a certified copy of the death certificate and returned to the bank the following week. However, without consulting Counsel, Petitioner intended to have the buyer wire funds into the account and did not have a check in hand at the bank. The bank informed Petitioner that the money had to be deposited when the account was opened. Petitioner has no vehicle and the buyer has been taking time from work to transport to the bank for this transaction. As such, Petitioner has not yet returned to the bank.</p> <p>As the procedure at Chase Bank is to allow the legal department a minimum of 7-10 business days to review a Receipt and Acknowledgment form, an additional 30 days is respectfully requested to allow Petitioner to schedule another trip to the bank with the buyer and to allow the bank to review and file the receipt.</p> <p>The First and Final Account and Petition for Final Distribution is ready for filing as soon as the funds are deposited. Counsel respectfully requests an additional 30 days for the filing of this petition as well.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 5-20-15: Counsel represents that she received a letter from the lender on 5-18-15 stating that escrow will close on 6-15-15.</p> <p>1. Need receipt for blocked account (MC-356).</p>
Cont. from 032515, 042915, 052015			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input checked="" type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

DOD: 2-7-07		<p>LORENA GARCIA, Daughter is Administrator with limited IAEA without bond. Letters issued 7-21-08.</p> <p>On 7-14-09, the Court approved a settlement agreement between Administrator (daughter) and Omega Ochoa Garcia (surviving spouse) and allowed continuation of estate administration pending certain issues: 1) Retrial of the damages portion of Civil Case # 04CECG03607 Garcia v. Roberts; and 2) Receipt of proceeds due from an eminent domain matter</p> <p>On 10-4-11 (the 7th status hearing regarding retrial of the damages issue), Attorney Emerzian advised the Court that a motion for a new trial was denied and an appeal has been filed, and that deposits need to be made.</p> <p>Status Report filed 8-27-13 states the estate is currently in a holding pattern pending the outcome of the appeal of the civil matter which holds the bulk of the estate property. There have been no funds received into the estate from the \$184,798 awarded in 7/2011 due to the appeal on behalf of the Roberts. The personal property listed on the inventory is currently in the possession of Omega Garcia (spouse). Until the civil matter is decided, we do not know what the final I&A amount will be.</p> <p>Status Report filed 11-24-14 states an email from Attorney Littlewood of McComrick Barstow, who handled the civil litigation regarding the real property and is also handling enforcement of the judgment with the Sheriff's Dept., on 11-20-14 stated that the Writ of Execution and instructions have been submitted to the sheriff. To date, the Sheriff has not issued a Notice of Sale, and calls to the Sheriff's Dept. have gone unreturned. Attorney Littlewood's colleague, John Hastrup, will attend the hearing on 12-4-14 to give the Court information.</p> <p>Status Report filed 4-14-15 states Attorney John Hastrup is now handling enforcement of the judgment with the Sheriff's Department. The Court ordered the Roberts to appear 5-14-15 and show cause why their property should not be sold to satisfy the judgment. Nothing further can happen until after that date. Ms. LeVan therefore requests a 60 day continuance.</p> <p>Status Report filed 6-9-15 states the hearing on the OSC in 04CECG03607 was continued to 6-25-15. Therefore, a 60 day continuance is requested.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from 042613, 083013, 013014, 050114, 100214, 120414, 041615, 061115			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 6-18-15			
Updates:			
Recommendation:			
File 2 - Garcia			

3A Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (pro per – former Executor)

Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)

Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/13 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See Page 12 for a related matter.</p> <p><u>CONTINUED FROM 03/25/15</u></p> <p>Minute Order from 01/21/15 states: Mr. Rindlisbacher reports that he is waiting to receive records from the Public Administrator. Mr. Rindlisbacher requests a 60 day continuance</p> <p>As of 06/18/15, nothing further has been filed.</p> <p>1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.</p>
Cont. from 040714, 050514, 070714, 090814, 102314, 012115, 032515		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 06/18/15
		Updates:
		Recommendation:
		File 3A – Wallace

3A

3B Paul Harvey Wallace (Estate)

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Case No. 08CEPR00294

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 03/25/15</u> As of 06/18/15, nothing further has been filed.
Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814, 102314, 012115, 032515	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
Aff.Sub.Wit.	Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 06/18/15
		Updates:
		Recommendation:
		File 3B – Wallace

3B

3C Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 03/25/15</u> As of 06/18/15, nothing further has been filed.
Cont. from 010214, 013014, 022014, 050514, 070714, 090814, 102314, 012115, 032515	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
Aff.Sub.Wit.	Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 06/18/15		
Updates:		
Recommendation:		
File 3C – Wallace		

3C

DOD: 01/21/2010	DOUGLAS J. GEIST , was appointed Administrator with full IAEA authority with bond set at \$400,000.00 on 05/04/2010.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 062014, 091014, 121014 , 031115, 042215	Letters issued on 05/20/2010.	OFF CALENDAR <u>Second Account and Petition for Final Distribution filed 06/23/2015. Hearing is set for 07/29/2015.</u>
	Inventory and Appraisal filed on 08/06/2010 shows an estate valued at \$333,944.84 .	
Aff.Sub.Wit.	Order Settling First Account and Report of Personal Representative filed 07/03/2013.	Minute Order of 04/22/2015: Counsel requests 60 days to allow time for resolution of creditor's claims. If the petition is filed at least two court days prior, then no appearance is necessary on 06/24/2015.
Verified		
Inventory	Minute Order of 07/03/2013 set this matter for Status Hearing. Bond reduced to \$55,000.00.	Minute Order dated 3/11/15 states Counsel reports that he was finally able to make contact with Katherine Murphy yesterday afternoon; he requests 6 weeks continuance in order for Ms. Murphy to complete her work.
PTC		
Not.Cred.	Former Status Report filed on 09/04/2014 by Attorney James E. Shekoyan states this estate is the beneficiary of the Estate of Marilyn Alice Geist (San Francisco County Superior Court Case No. PES-07-290788). The Estate of Marilyn Alice Geist was distributed in June 2012 reserving closing costs. Since that time, Petitioner and Petitioner's attorney have repeatedly attempted to contact Petitioner's attorney in the San Francisco case, Kathy Murphy, requesting that the estate be closed and Petitioner's bond in that estate be discharged.	1. Need Petition for Final Distribution or <u>current</u> written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt	In May 2014, Petitioner's attorney spoke with Ms. Murphy. Ms. Murphy indicated that there was a tax problem with the estate and that she would resolve the issue shortly. As of this date, neither Petitioner nor his attorney have heard from Ms. Murphy. On 08/28/2014, Petitioner's attorney sent Ms. Murphy a letter requesting the distribution from the Marilyn Geist Estate. A copy of the letter is attached. Ms. Murphy has not yet responded to the letter.	
CI Report		
9202		
Order	In light of the foregoing, Petitioner requests a continuance of this status hearing for at least two months to allow Ms. Murphy to resolve the tax issue, distribute the balance of the funds, and discharge Petitioner's bond in that estate.	
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 06/19/2015
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 4 - Geist

5 Vera Silberstein Secondary Trust for Personal Care Case No. 11CEPR00300

Attorney Deeringer, James L.
Attorney Silvio, Reggiardo, III

Probate Status Hearing RE: Proof of Increased Bond

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Additional bond filed 6/15/15
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
Reviewed by: skc		
Reviewed on: 6/19/15		
Updates:		
Recommendation:		
File 5 - Silberstein		

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

			See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice on: <ul style="list-style-type: none"> - Faith Esqueda (Minor) - Sam Esqueda (Father) 3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Ray Gomez (Maternal Grandfather) - Paternal Grandfather (not identified) - Paternal Grandmother (not identified)
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail	X		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	X		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/18/15	
			Updates: 6/23/15	
			Recommendation:	
			File 6 – Esqueda	

Attorney: Catherine A. Amador (for former Conservators of the estate and current conservators of the person Manuel Chavez and Susan Chavez-Leon)

Attorney: Heather H. Kruthers (for current Conservator of the estate, Public Guardian)

Sixth Amended First Account and Report of Conservators; Petition for Allowance of Fees to Attorney for Conservators.

		MANUEL CHAVEZ , father, and SUSAN CHAVEZ-LEON , sister, Co-Conservators of the Person and Estate, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: Note: Manual Chavez and Susan Chavez-Leon were removed as Co-Conservators of the Estate and the Public Guardian appointed by minute order dated 12/11/15. 1. Upon cursory review, the sixth amended first account does not balance. Charges total \$321,123.66 and Credits total \$317,826.30. Property on hand at the end of the account period totals \$237,282.98. Therefore examiner has not reviewed the rest of the pleadings.
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 6/22/15	
		Updates:	
		Recommendation:	
		File 7 - Chavez	

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

	TERRI DENISE GILL , daughter, was appointed Executor with full IAEA authority without bond on 02/13/2013.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued 02/19/2013. Minute Order of 02/13/13 set this matter for hearing.	
	Inventory & Appraisal Partial #1 filed 07/12/13: \$77,240.00	<u>OFF CALENDAR.</u> <u>First and Final Account filed 06/18/2015. Hearing is set for 07/29/2015.</u> Minute Order of 04/15/2015: Counsel requests 60 days continuance. Order Approving Settlement was filed 04/29/2015. 1. Need First Account or Petition for Final Distribution or <u>current</u> written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from 041814, 082214, 102314, 120414, 041515	Inventory & Appraisal Partial #2 filed 07/12/13: \$40,024.41	
Aff.Sub.Wit.	Inventory & Appraisal Final filed 07/12/13: \$19,813.34	
Verified	Status Report filed 03/10/14 Petitioner and Robert Hanggi, through their respective attorneys, have been in negotiations to settle the estate. As of the date of this Status Report no agreement has been made. The last offer to settle was made by Petitioner's attorneys on 12/12/2013. Mr. Pape has advised that Robert Hanggi recently had surgery and was unavailable to review the settlement proposal. Petitioner intends to file a Petition under Probate Code §850, and have the court determine the separate property and the community property interest that the Decedent owned at the time of death. Once these issues are resolved petitioner will prepare and file a Petition for Final Distribution of the Estate. Former Report of Status of Administration filed 08/18/14 states Petitioner filed an 850 Petition seeking to have the tentative property settlement that decedent and her husband, Robert H. Hanggi, had negotiated before the death of the decedent confirmed. Petitioner has been in negotiations with counsel for Robert H. Hanggi on resolution of this matter. Robert H. Hanggi has filed a Petition for a Probate Homestead over the interest the decedent owned in the real property. The hearing on the 850 Petition and the Petition for a Probate Homestead has been continued to 10/02/2014. Petitioner believes there is a reasonable probability that the matters will be resolved at that time. Petitioner is informed and believes and thereon alleges that the estate may be in a position to close by the end of 2014. The major issue to be resolved is the amount the decedent's estate will receive from Robert Hanggi, for decedent's interest in the residence and reimbursement of the funds for the cattle which he deposited into his own account and the termination of the length of his Probate Homestead.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 06/19/2015
UCCJEA		Updates: 06/22/2015
Citation		Recommendation:
FTB Notice		File 8 – Hanggi

DOD: 11/26/12	BETTY PHILLIPS and ROSE LEE LITTLE,	NEEDS/PROBLEMS/COMMENTS:
	sisters, were appointed Co-Executors	
	with full IAEA and without bond on	
	06/11/13. Letters Testamentary were	
	issued on 06/11/13.	
Cont. from 080814,	Inventory & Appraisal, partial no. 1, filed	CONTINUED FROM 04/22/15
102314 , 012115,	02/13/14 - \$615,000.00	Minute Order from 04/22/15 states:
042215		Counsel is to have a Status Report or
Aff.Sub.Wit.	Inventory & Appraisal, final, filed	the petition filed by 06/22/15. If the
Verified	07/17/14 - \$63,096.95	petition is filed, then no appearance
Inventory		is necessary on 06/24/15.
PTC	Status Report filed 06/24/15 states: Since	
Not.Cred.	the last status report, a request for	1. Need Account/Report on Waiver
Notice of Hrg	default judgment against Karlie	of Account and Petition for Final
Aff.Mail	Steinhauer and Jamie Rust, defendants	Distribution <u>and/or</u> current written
Aff.Pub.	in the civil action Phillips and Little vs.	status report.
Sp.Ntc.	Steinhauer and Rust was filed on	
Pers.Serv.	05/26/15. A judgment against	
Conf. Screen	Steinhauer and Rust is necessary for	
Letters	inclusion as an asset of this Estate. As of	
Duties/Supp	06/16/15, Petitioner is still waiting for a	
Objections	Judgment to be entered by the Court.	
Video Receipt	The Judgment is in excess of \$56,000.00.	
CI Report	Upon entry of the judgment against	
9202	Steinhauer and Rust, it is believed that	
Order	the estate will be in a condition to be	
Aff. Posting	closed.	
Status Rpt		Reviewed by: JF
UCCJEA		Reviewed on: 06/18/15
Citation		Updates:
FTB Notice		Recommendation:
		File 9 – Kiramidjian

DOD: 05/29/14	JOSEPH DE LOS REYES , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		1. It is unclear whether petitioner is seeking court authority to complete a sale of the real property or to list the property for sale. If seeking authority to complete a sale, a Report of Sale and Petition for Order Confirming Sale of Real Property is required pursuant to Probate Code § 2540. 2. The Conservatee died on 05/29/14, therefore the Conservatorship terminated by operation of law on 05/29/14. The Court retains jurisdiction for the purpose of settling the final account of conservator pursuant to Probate Code § 2630. However, since the conservatorship has terminated due to conservatee's death, it appears that the sale of real property should occur in a subsequent probate proceeding after the final account of Conservator has settled and assets distributed to the Administrator of the Estate.
Cont. from	On 06/11/15, Petitioner filed an Application for Ex Parte Hearing on Request to Sell Real Property . Per Order filed 06/12/15, the matter was set for hearing on 06/24/15 upon due Notice of Five (5) Court Days.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 06/22/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice	Petitioner states that the real property owned by the conservatee is presently in foreclosure due to unpaid mortgage fees of approximately \$14,113.48 as of 03/11/15. No payments have been made as there are no funds available in the conservatorship estate. Upon the death of the conservatee, the checking account had a balance of \$11,076.17. The bank automatically closed the account and disbursed the funds to the named beneficiaries to be paid upon the death of the conservatee. The real property is scheduled to be sold on 07/15/15. Due to the urgency of this matter, Petitioner is making this application ex parte. Declaration of Petitioner in Support of Application for Ex Parte Hearing of Request to Sale [sic] real property filed 06/11/15 states: when the conservatee was alive, the mortgage was paid directly from his bank account, but after his death, the bank would not allow the payments to continue and closed the account. The amount owing on the mortgage is \$167,000.00 and there is a \$17,000.00 line of credit. There were never sufficient assets to pay the mortgages owing on the property. The other beneficiaries of the estate are in support of this Petition.	File 10 – De Los Reyes

Petition for Termination of Proceedings and Discharge

DOD: 4/26/13		<p>CHARLES ROBERT SIEK, Executor, is petitioner.</p> <p>Petitioner states there is no property of any kind, whatsoever, belonging to the estate and subject to administration which remains for distribution in that the decedent has a revocable trust which the one asset which was not titled in the trust, to wit, the Merrill Edge Account, has been transferred to the trust. Therefore, the Petitioner is not aware of any additional property which is subject to this probate proceeding.</p> <p>Petitioner requests that the court make an order terminating the administration of the estate and discharging the personal representative.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3/11/15. Minute order states Counsel requests 90 days for responses from the Department of Health Services and the Franchise Tax Board. As of 6/22/15 no additional documents have been filed. However a revised order has been submitted.</p> <ol style="list-style-type: none"> 1. It appears that there was an asset of the estate, the Merrill Edge Account, which appears to have been transferred to the Trust without court authorization during the administration. Probate Code §10501(a)(4). Therefore it appears that the administration of the estate should proceed which would include the filing of an inventory and appraisal and a Petition for Final Distribution 2. Petition does not address notice to Department of Health Services. 3. Petition does not address Notice to the Franchise Tax Board.
Cont. from 022615, 031115			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 5/21/14		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 6/22/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Siek</p>	

12 Paul Harvey Wallace Trust

Case No. 14CEPR00601

Atty Petoyan, Marcus (for Laura Leonard – beneficiary/Petitioner)
 Atty Kruthers, Heather (for Public Administrator – successor trustee)

Probate Status Hearing RE: Account

DOD: 06/22/07	<p>LAURA LEONARD, step-daughter and beneficiary of the Trust, filed a PETITION FOR ORDER ACCEPTING RESIGNATION OF TRUSTEE AND FOR APPOINTMENT OF THE FRESNO COUNTY PUBLIC ADMINISTRATOR SUCCESSOR TRUSTEE on 07/02/14.</p> <p>On 08/25/14, the Petition was granted and the PUBLIC ADMINISTRATOR was appointed as Successor Trustee.</p> <p>Minute Order in related matter estate matter for Paul Harvey Wallace set this matter for a status hearing on 3/25/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See pages 3A, 3B and 3C for related matter.</p> <p><u>CONTINUED FROM 03/25/15</u></p>
Cont. from 032515		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 06/18/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 - Wallace</p>

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 9/11/14	<p>CLARK SMITH, Brother, was appointed Administrator with Full IAEA without bond on 10/27/14.</p> <p>The Court set status hearing for 3/2/15 for the filing of the Inventory and Appraisal, which was continued to 5/13/15.</p> <p>Status Report filed 5/6/15 states a partial Inventory and Appraisal was sent to the probate referee on 4/29/15, which includes three accounts and a piece of real property in Fresno. The remainder of the estate consists of approx. 11,800 acres of land, some of which is grazing land, some of which are permanent crops. There are approx. 30 parcels that make up the acreage. Due to the large amount of acreage, it has been necessary to order lot book guarantees from the title company in order to assure the correct title and legal descriptions. The request was sent 4/17/15. The estimate of time needed to complete the lot book guarantees from the title company was 4-6 weeks.</p> <p>Therefore, approx. 45 days is requested to allow time to prepare and file the final Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Administrator was formerly represented by Attorney Gary Motsenbocker. Attorney Dean Hiyama subbed in on 4/7/15.</p> <p>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or current written status report per Local Rule 7.5.</p>
Cont. from 030215, 051315		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: skc</p> <p>Reviewed on: 6/18/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Smith</p>		

DOD: 9/9/14		HERMINA HAWKINS , Niece, was appointed Executor with Full IAEA with bond of \$25,000.00 on 4/8/15. Bond was filed 4/29/15. Letters issued on 5/21/15. Status Report filed 6/15/15 states the final Inventory and Appraisal was mailed to Probate Referee Rick Smith on 6/16/15 and will be filed upon receipt.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory and Appraisal pursuant to Probate Code §8800.
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 6/18/15			
Updates:			
Recommendation:			
File 14 - Hooker			

DOD: 9/5/13		CHRISTINA NONINI PERICAS and MARTIN A. NONINI were appointed Co-Administrators with Will Annexed with Full IAEA without bond on 12/9/14.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 052015		At the hearing on 12/9/14, the Court set this status hearing for the filing of the Inventory and Appraisal.	1. Need Inventory and Appraisal pursuant to Probate Code §8800 or current written status report pursuant to Local Rule 7.5.
Aff.Sub.Wit.		<p>Status Report filed 5/19/15 states an Inventory and Appraisal has been submitted to the Probate Referee for appraisal. There are two items included: One is an undivided interest in real property in San Luis Obispo County that needs to be appraised by the Probate Referee in that county. The other is two units in a limited partnership that was discovered while reviewing the decedent's final personal income tax returns. Information concerning the limited partnership interest is necessary to complete the I&A and was only recently provided by the limited partnership. It is anticipated that it can be filed within the next 30 days. Attorney Simonian will attend the status hearing and can address additional questions at that time.</p>	
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

First and Final Report of Personal Representative; Petition for Final Distribution on Waiver of Account; Waiver of Fees by Personal Representative; and Payment of Compensation to Attorney for Ordinary Services

DOD: 10/16/13			<p>JANET D. KRAMER, Daughter and Executor with Full IAEAE without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A: \$200,000.00 (real property) POH: \$200,000.00 (real property)</p> <p>Executor (Statutory): Waived</p> <p>Attorney (Statutory): \$7,000.00</p> <p>Costs: \$1,455.00 (filing, publication, appraisal)</p> <p>Attorney requests the fees and costs be ordered as a judicial lien against the estate real property.</p> <p>Distribution pursuant to the decedent's will:</p> <p>Janet D. Kramer – An undivided one-half interest in the real property located at 519 E. Sample in Fresno, as tenants in common</p> <p>Gary S. Ragsdale – An undivided one-half interest in the real property located at 519 E. Sample in Fresno, as tenants in common</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need written consent of Gary S. Ragsdale to distribution of real property in undivided interests pursuant to Local Rule 7.12.4.</p>
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓ S	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 6/18/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 - Ragsdale</p>	

Petition for Final Distribution on Waiver of Accounting

DOD: 12/29/12		<p>LOUIS L. ROUGHT, Brother And Administrator with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A: \$165,693.59 POH: \$179,945.57 (cash)</p> <p>Administrator (Statutory): Waived Attorney (Statutory): \$5,970.81</p> <p>Closing: \$1,500.00</p> <p>Distribution pursuant to intestate succession:</p> <p>Sullivan Rought, Sr.: \$172,474.76</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
<input checked="" type="checkbox"/>	FTB Notice			
<p>Reviewed by: skc</p> <p>Reviewed on: 6/18/15</p> <p>Updates: 6/23/15</p> <p>Recommendation: SUBMITTED</p> <p>File 17 - Rought</p>				

Petition for Termination of Proceedings and Discharge of Executor for Want of Assets Subject to Administration

DOD: 6/2/14		<p>DYLON CAMPBELL, Executor, is petitioner.</p> <p>Petitioner states after the initiation of the probate proceedings and the appointment of Petitioner as Executor, Petitioner found that there is no property of any kind belonging to the estate and subject to administration. There is no longer any necessity for continuing the administration of the estate.</p> <p>Wherefore, Petitioner requests orders as follows:</p> <ol style="list-style-type: none"> Administration of the estate be immediately terminated for want of assets; Petitioner be discharged as the Executor of the estate. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The California Franchise Tax Board filed a Request for Special Notice. The California Franchise Tax Board was served but not with a copy of the petition as required. Probate Code 12251 requires notice of the hearing to be given to all interested persons. Probate Code §48 defines interested persons as: an heir, devisee, child, spouse, creditor, beneficiary, and any other person having a property right in or claim against a trust estate or the estate of a decedent which may be effected by the proceedings. Therefore, need proof of service on the following creditors: <ul style="list-style-type: none"> a. Bank of the West b. American Express c. Pacific Gas & Electric d. Saint Agnes Medical Center Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required. 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/O
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order	X		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: KT</p> <p>Reviewed on: 6/22/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18 - Campbell</p>				

Probate Status Hearing RE: Filing of the Inventory and Appraisal

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> I&A filed 5/27/15	
DOD:			
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 6/18/15			
Updates:			
Recommendation:			
File 19 - Gonzales			

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Maria Tapia (Paternal Grandmother) - Joe Castillo (Maternal Grandfather)
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail	X		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/18/15	
			Updates:	
			Recommendation:	
			File 20 - Sanchez	

Probate Status Hearing RE: Proof of Bond

Age:			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Bond filed 5/27/15 Letters issued 5/27/15	
DOD:				
Cont. from				
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc				
Reviewed on: 6/18/15				
Updates:				
Recommendation:				
File 21 - Chester				

Petitioner Irma E. Ceja (Pro Per Petitioner)

Petition for Probate of Will and for Letters Testamentary (Prob. C. 8002, 10450)

DOD: 6/16/06		IRMA E. CEJA is Petitioner and requests appointment as Executor with Full IAEA. (Relationship not stated, bond not addressed.) Full IAEA – need publication Petitioner states Decedent died intestate at #3e. Residence: Fresno Publication: need publication Estimated value of estate: Annual income from real property: \$110,000.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> A competing petition for probate was filed 6/22/15 by Rudy Ceja (Son) that is set for 8/10/15. <u>Note:</u> Petitioner may wish to amend the petition in its entirety, or may wish to seek legal advice regarding other potential options for this estate. 1. Petitioner does not state her relationship to the decedent and does not list herself at #8. Petitioner states at #3f(2) that she is entitled to Letters, but does not explain. 2. The petition is blank at #5. 3. Petitioner does not provide the relationships of the people listed at #8 to the decedent. 4. Petitioner requests appointment as executor, but states the decedent died intestate, and the petition is blank at #3f. Need clarification. 5. #3c indicates that the estate consists of income from real property, but does not indicate real property. Did petitioner mean that the estate consists of real property valued at \$110,000 rather than income? 6. If the will does not waive bond, bond of at least \$110,000 will be required unless bond is waived by all heirs. 7. Need Notice of Petition to Administer Estate (Form DE-121). 8. Need proof of service of Notice of Petition to Administer Estate on all persons entitled to notice pursuant to Probate Code §8110. 9. Need publication pursuant to Probate Code §8120. <u>Note:</u> If granted, the Court will set hearing dates for the filing of the Inventory and Appraisal and the filing of the petition for final distribution as appropriate. Hearing dates are not provided at this time, as it does not appear the petition is ready to be granted.	
Cont from 040815, 051315				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			x
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc				
Reviewed on: 6/18/15				
Updates: 6/22/15				
Recommendation:				
File 22 – Ceja				

23 Mary Louise Bandy (Estate) Case No. 15CEPR00287

Atty Kruthers, Heather H (for Public Administrator – Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 06/08/2014	PUBLIC ADMINISTRATOR , is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 05/20/2015: The Court admonishes counsel that it expects action to be taken between now and the hearing on 06/24/2015 so that the matter can be moved forward at that time. Minute Order of 05/06/2015: This matter was on the pre-approved list, however Ms. Standard represents that there is possibly a lost will and advises that she will be filing a formal objection. At the time of this examiner's review no written objections have been filed. Note: If the petition is granted status hearings will be set as follows: • Wednesday, 11/18/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 08/24/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: LV Reviewed on: 06/18/2015 Updates: Recommendation: File 23 - Bandy
	Full IAEA – o.k.	
Cont. from 050615, 052015	Decedent died intestate	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Residence: Squaw Valley Publication: The Business Journal	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Estimated value of the Estate:	
<input type="checkbox"/> Not.Cred.	Personal property - \$303,204.27	
<input checked="" type="checkbox"/> Notice of Hrg	Probate Referee: Rick Smith	
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp	n/a	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

23

Probate Status Hearing RE: Proof of Bond

DOD: 12/28/14	DEBORAH A. HARPER , Spouse, was appointed Administrator with Full IAEA with bond of \$185,000.00 on 5/13/15.	NEEDS/PROBLEMS/COMMENTS: 1. Need bond of \$185,000.00 or written status report pursuant to Local Rule 7.5.
	At the hearing on 5/13/15, the Court set this status hearing for the filing of bond.	
	Letters have not yet issued.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6/18/15
		Updates:
		Recommendation:
		File 24 - Harper

Probate Status Hearing RE: Proof of Bond

Age:			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Bond Filed 5/25/15. Letters issued 5/29/15.	
DOD:				
Cont. from				
Aff.Sub.Wit.				
Verified				
Inventory				
PTC				
Not.Cred.				
Notice of Hrg				
Aff.Mail				
Aff.Pub.				
Sp.Ntc.				
Pers.Serv.				
Conf. Screen				
Letters				
Duties/Supp				
Objections				
Video Receipt				
CI Report				
9202				
Order				
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice				
			Reviewed by: skc	
			Reviewed on: 6/18/15	
			Updates:	
			Recommendation:	
			File 25 - Jackson	

Petitioner

Yvonne Cruz (Pro Per – Paternal Grandmother – Petitioner)

Petition for Appointment of Temporary Guardian of the Person (Prob. Code §2250)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/18/15	
			Updates:	
			Recommendation:	
			File 27 - Villa	

Petitioner Salazar, Christopher Manuel (Pro Per – Brother)

Petitioner Lomeli-Marashlian, Erica (Pro Per – Maternal Aunt)

Petition for Appointment of Temporary Guardianship of the Person

		<u>GENERAL HEARING 08/11/2015</u>	NEEDS/PROBLEMS/COMMENTS:	
		CHRISTOPHER MANUEL SALAZAR , brother, and ERICA LOMELI-MARASHLIAN , aunt/god mother, are petitioners. <p style="text-align: center;"><u>Please see petition for details</u></p>	1. Need Notice of Hearing. 2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> Mario Jesse Herrera, II (Father) Lisette Lorraine Rosato (Mother) 	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: LV	
			Reviewed on: 06/19/2015	
			Updates:	
			Recommendation:	
			File 28 - Herrera	

Attorney Erlach, Mara M. (for Christina F. Rendino – surviving spouse/Petitioner)

Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 09/23/14		CHRISTINA F. RENDINO , surviving spouse, is Petitioner, and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 061715		Full IAEA – OK	CONTINUED FROM 06/17/15 Minute Order from 06/17/15 states: The Court indicates that it will either set bond or limit the powers; Counsel needs time to discuss with her client.
<input type="checkbox"/>	Aff.Sub.Wit.	Decedent died intestate	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Residence: Fresno	
<input type="checkbox"/>	PTC	Publication: The Business Journal	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Estimated Value of the Estate:	
<input checked="" type="checkbox"/>	Aff.Mail	Personal property - \$ 40,000.00	
<input checked="" type="checkbox"/>	Aff.Pub.	Annual income - 500.00	
		Real property - 200,000.00	
		Total - \$240,500.00	
<input type="checkbox"/>	Sp.Ntc.	Probate Referee: RICK SMITH	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Declaration of Joseph J. Doerr re Information Pertaining to Petition of Christina Rendino for Letters of Administration and Waiver of Bond	
<input checked="" type="checkbox"/>	Letters	filed 06/16/15 states: He prepared the durable power of attorney (DPOA) that Mercedes Rendino executed nominating Christina Rendino as her attorney in fact. He is familiar with both the document and with the intent of the principal in making the DPOA. The authority to waive bond in a proceeding in which the principal stood to inherit property is implicit not only in the estate planning power of the DPOA but also in the general power and authority Mercedes Rendino intended to give to her agent. Further, on 05/06/15 Mercedes Rendino assigned her interest in the Decedent's estate to Christina Rendino by and through her DPOA. The DPOA provides at Article II, Section 3, Subsection (j) – no person shall be disqualified from receiving gifts or any other benefit from the Principal by reason of serving as Agent. Accordingly, Christina Rendino is the sole beneficiary of the estate and has therefore waived bond.	
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF

Reviewed on: 06/18/15

Updates:

Recommendation:

File 29 - Rendino

Atty McCloskey, Daniel T. (for Gregory L. Taylor – Administrator with Will Annexed)

Atty Anderson, Bonnie (for Diane Taylor) Diane Taylor is now self-represented

Notice of Motion for Order Striking the Memorandum of Costs in Its' Entirety or in the Alternative Taxing Costs of Court

DOD: 2/16/09		GREGORY L. TAYLOR , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner moves the court for an order striking the entire Memorandum of Costs as untimely, or, in the alternative taxing the costs of this action under Cal. Rules of Court 870 and CCP §1033.5 with specific reference to the following:	<p>Note: Pursuant to Substitution of Attorney filed 6/15/15, beneficiary Diane Taylor is now self-represented.</p> <p>Minute Order 6/17/15: Ms. Taylor requests time to ascertain whether or not she wants to remain involved in disputing this matter. The Court will grant this one continuance absent extraordinary good cause.</p> <p>Update: Ex Parte petition filed 6/23/15 will be addressed at the hearing.</p>
Cont from 061715			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<ol style="list-style-type: none"> Item 1 (b) \$105.00 re a status report. Objector is not required to file a status report and it is unnecessary, not reasonable, excessive, and no results were achieved. Items 1 (c) (e) (f) \$1,305.00 re filing fees to object to the First and Final Account as such pleadings were not necessary nor reasonable to secure Objector's inheritance. This cost was incurred after the 2006 Codicil was admitted to probate. Objector is seeking fees for not only work that was unreasonable, unnecessary, and in excessive amounts and where Objector lost on each objection. Items 5(a)-(c) \$307.71 service of process Item 8(a) \$75.00 cost not properly chargeable. Item 10 \$23,011.50. Attorney fees are not proper for inclusion in this memorandum of costs pursuant to CCP and can only be awarded through a noticed motion process or through the probate petition process. This matter was correctly referred back to the Probate Judge without hearing, and the cost of this item is not properly chargeable in this action nor is it a cost allowable by memorandum under CCP 1033.5. Item 11 \$606.17 for trial exhibits & blowup of charts. There was no trial so this is not a cost allowable under CCP. Item 12 \$1,035.00 for court reporter fees <p>Points and authorities provided.</p> <p>See also Declaration of Daniel T. McCloskey in Support of Motion for Order Taxing Costs filed 5/8/15.</p> <p>Mr. McCloskey filed a status report on 6/18/15.</p> <p><u>SEE ADDITIONAL PAGES</u></p>	
			<p>Reviewed by: skc</p> <p>Reviewed on: 6/22/15</p> <p>Updates: 6/23/15</p> <p>Recommendation:</p> <p>File 30 - Taylor</p>

Status Report filed 6/18/15 provides the following history:

- 11/5/13 – Petitioner Gregory L. Taylor was appointed Administrator with Will Annexed with bond of \$205,000.00, and the Decedent's will dated 8/2/89 and Codicil dated 1/7/06 were admitted to probate. However, Petitioner failed to qualify for a bond.
- On 12/2/13, Petitioner filed a Third Amended Petition requesting that the Court issue Letters with Limited authority under IAEA, which was granted 2/3/14.
- I&A filed 3/4/14 shows the value of the estate to be \$170,000.00 (residential real property on Gettysburg in Clovis).
- On 4/15/14, the Court confirmed the sale of the real property for \$153,000.00, and proceeds of \$142,708.70 were placed into a blocked account (receipt filed 5/6/15).
- Petitioner filed a First and Final Report of Administrator/Petition for Final Distribution on 6/4/14. Diane Taylor filed an Objection on 6/26/14.
- On 7/11/14, the Honorable Robert H. Oliver entered an order approving the petition, reserving \$15,000 of the corpus and \$10,000 of Ms. Taylor's share to be held in the blocked account. The order provided for statutory and extraordinary fees to the Administrator's attorney and distribution except for the reserved amounts. The Court directed the Administrator's attorney to file a Petition to Surcharge the Objector's share of the estate, and then reserved \$10,000 of the Objector's share for surcharge.
- On 8/8/14, Petitioner filed a Petition for Surcharge of Objector Diane Taylor's share.
- On 8/15/14, Diane Taylor filed a Petition to Approve Attorney's Fees and Costs. Objection and Reply were timely filed.
- At the 9/9/14 hearing, the Court set the matter for Court Trial for determination of the surcharge and attorney's fees. After various continuances, on 11/4/14, after reviewing Judge Oliver's Order of Final Distribution filed 7/11/14, Judge Hamilton found that the ONLY issue remaining was for Objector to file a memorandum of her costs, and ordered that no further evidence need be taken on this limited issue. The matter was then returned to the Probate Court for ruling on the petitions.
- At a status hearing on 1/9/15, the petitions were continued. On 3/20/15, Objector was directed to file her memorandum of costs. A hearing was scheduled for 5/26/15.
- Objector filed Memorandum of Costs on 4/20/15 and in response, Petitioner filed this Motion to Tax Costs, which was scheduled for 6/17/15. The 5/26/15 hearing was continued to 6/17/15 so that the petitions would be heard along with Petitioner's motion.
- On 6/15/15, Objector's attorney filed a substitution withdrawing as counsel for Objector and listing Objector as self-represented.
- **Petitioner requests that the Petition for Surcharge and Petition for Attorneys' Fees previously filed with this Court be heard simultaneously with the Motion to Tax Costs currently scheduled to be heard on 6/24/15.**
- Petitioner requests that he be excused from attending the status hearing as he is a Police Officer with City of Fresno and is currently assigned to the Graveyard Shift.